

Request for Proposal

Summary

3Degrees, a renewable energy trading, retail, and marketing firm headquartered in San Francisco, is accepting proposals for the design and development of an enrollment and employee shift tracking website for outreach activities in one of its business lines. This business line is focused on long-term partnerships with utilities across the United States in which 3Degrees helps the utility partner educate and enroll its customers in voluntary green power programs. These customers are primarily residential. One of the ways we enroll customers is through community outreach and face-to-face interactions.

3Degrees' existing methods for tracking enrollments and employee shift metrics rely on ad hoc Excel workbooks, paper logs, and in the case of a single outreach program, a SQL Server database managed directly in Microsoft Access.

We have expanded our outreach activities significantly over the last decade, in terms of number of outreach staff, geographic footprint, and the complexity of our efforts. The primary objectives of this project are to centralize the collection of data about enrollments, systematize the methods of processing it, and enable reporting and metrics on the collected data.

Guidelines

Interested parties should submit letters of intent by 11:59 PM PST 1/24/14. Proposals must be submitted by 11:59 PM PST 2/7/2014. Proposals received after this date and time will not be considered. The proposal must be in PDF format.

Proposals must include:

- Company name
- Contact details (for primary & secondary contacts)
- Company website URL
- Company history and background
- What resources would be dedicated to the project
- Descriptions of project management processes & tools
- Work samples and designer portfolios for projects of similar scope and size
- Contact details for at least two references

Proposals should include:

- An overview of your proposed process for the project

- A draft timeline for the project with checkpoint deliverables
- Your thoughts on meeting each point identified under *Purpose*
- Your qualifications for each domain identified under *Scope*

We are seeking a finished product by April 30th.

Purpose

While 3Degrees has grown and succeeded operating with ad hoc outreach enrollment tracking, the structure around managing these efforts has become diffuse and duplicative without a central tool around which to organize. This project is an effort to address those inefficiencies, reduce the time and effort required to process enrollments and gather simple employee performance metrics, and leverage the data gathered for business intelligence.

An implementation should:

- Demonstrate modern and intuitive design of both backend and interface
- Permit usage of the principal enrollment tracking functionality from desktop or mobile devices
- Be easy to use and approachable by non-technical users
- Provide for future extension and integration with other business systems
- Be easily and quickly deployed to new images or hardware
- Show consistency with 3Degrees' brand and aesthetic

Scope

The result of the project will primarily comprise a website serving the functionality described in this document.

Major areas of work:

- Development of frontend and backend systems
- Interface & workflow design
- Information design & persistence
- System architecture, monitoring & maintenance

The scope of this project does not include integrations with other systems, ongoing maintenance or support. Vendors willing to offer these services are advised that these areas are out of scope for this project, but may offer these services to 3Degrees in an addendum or separately from their proposal.

Requirements

Non-Negotiable

- Allow collection of enrollment and Do Not Solicit records (collectively referred to as enrollments)
- Reconcile enrollment records with participation records from external sources to verify enrollments
- Track metadata about an enrollment including (not exhaustive)
 - the user who submitted the enrollment
 - the shift the user was working when the enrollment was made
 - the campaign under which an enrollment was made
 - the program the enrollment is for
- Create & maintain programs, campaigns, shifts, users & other records
- Flexible reporting showing various performance metrics
- Export of data and reports
- User roles restricting access to reporting and functionality, and within programs
- Retain an audit trail on resource changes
- Provides a standards-based API providing access to system functionality and records
- Built to be secure by default and resistant to attack
- Production service must be hosted on 3Degrees' servers, *can not* be hosted on any cloud or managed hosting service
- Documentation on building, running and maintaining the site after completion of the project

Optional

- OpenID-based logins (3Degrees specifically issues its employees Google Apps accounts)

Licensing

All code, assets and content must be produced with licensing which allows 3Degrees to modify, redistribute or otherwise reuse the materials at will.

Design

System Architecture & Maintenance

Enrollment tracking may involve varying data requirements between outreach programs. The system should be permissive in what it accepts, with emphasis placed on the strength of drafting, approving, and reconciling features to produce known good enrollments and participation data. Sources of information may produce data as discrete records, or as bulk data sheets. It is not necessary for a proposal to handle completely arbitrary data formats, but the site should be able to handle CSVs with out of order or differently named columns for data import.

3Degrees may leverage the functionality of the system through integrations it builds with other preexisting or future systems. This could take the form of enrollments being passed to the system programmatically, participation records for reconciliation being loaded in batch, information on confirmed enrollments being extracted for processing, or any number of other functions. Details on building a flexible API to support these and other use cases are left to the vendor for proposal.

The results of the project must be well-documented. The documentation should cover the architecture of the system, build and install instructions, in-app workflows, and the API the system serves.

Visuals

The design of the site should use modern web design best practices. It is expected that the site produce valid HTML and use CSS for style and layout. A portion of the website must work on mobile devices, particularly the enrollment entry and shift tracking system, and per-user performance metrics.

The website should be thematically consistent with 3Degrees' other branding. Vendors should examine <http://3degreesinc.com/>.

Software

The project must primarily be built in one of Haskell, Python or Ruby. Components of the project may be written in other languages. E.g., client side scripting may be written in JavaScript or CoffeeScript. The project must not be implemented on top of e.g. SugarCRM, which is written in PHP.

Persistence

The project must use PostgreSQL or MySQL for its database persistence layer.

Security

The system must be capable of running on hardware owned and operated on site at 3Degrees' headquarters, and host a webpage available at a sub-domain of 3degreesinc.com. Care must be taken to provide for the security of the site against attack and intrusion. Proposals should include a discussion of security strategies.

Cost Estimates

We expect that designing the user interface of the website may take a number of rounds of collaboration between your designer and ourselves. This is fine and we expect an iterative approach to refining the design of the interface.

Estimates should be split to reflect rates appropriate to the type of work being done. Our suggested format is:

- Fixed \$ amount – Backend work
- User interface design – \$ amount per hour/iteration

Selection

Evaluation will be based on:

- Proposal comprehensiveness
- Adequacy of company expertise and resources
- Clear articulation of plan for follow-up and further refinement
- Submission delivered by deadline
- Instructions and requirements were followed

3Degrees will make a final selection after having received and reviewed all proposals.

Please direct all inquiries to techdev@3degreesinc.com. Vendors should feel welcome to ask questions or discuss their proposal before submitting.